



## Welcome to Polaris!

### Space Camp Library Card

Name: \_\_\_\_\_

Barcode: \_\_\_\_\_

(211810mmddyjyly)

Pin: \_\_\_\_\_

**Confidentiality:** We want encourage everyone to practice with Polaris but in order to continue to respect our patrons' right to privacy please use your own library account or any dummy accounts you created.

**Shortcuts give you a quick way to do an action!**

### Circulation Shortcut Keys

Help	Check In	Check Out	Refresh	Patron Status	Patron Records	Patron Bridge	Bib-Find Tool
F1	F2	F3	F5	F6	F7	F9	F12
<ul style="list-style-type: none"><li>• F1—Help</li><li>• F2—Check-In ( In has 2 letters)</li><li>• F3—Check-Out ( Out has 3 letters )</li><li>• F5—Refresh</li><li>• F6—Patron Status (status has 6 letters)</li><li>• F7—Patron Records (records has 7 letters)</li><li>• F9—Switch (Bridge) between Patron Registration and Patron Status</li><li>• Ctrl + Alt + F9—Item Record Find Tool</li><li>• F12—Bibliographic Record Find Tool</li></ul>							


### Other shortcuts of note:

**CTRL + Shift + a** (karate chop) – use to include all records from a search in the list

**ALT + F4** – closes windows

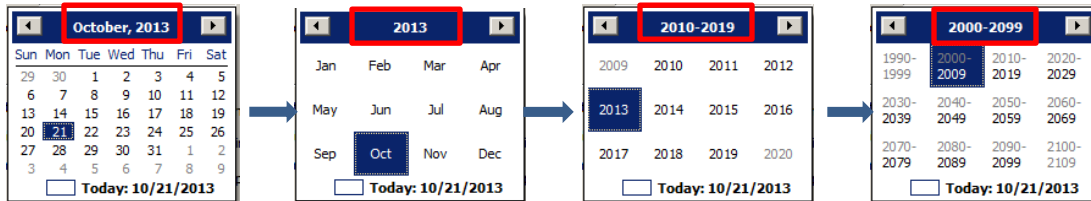
**Shift + Click** – to highlight a list

**Ctrl + Click** -- to select multiple items not in order on a list

 + **C** – Close all Polaris Windows

## Tips and pointers:

- Start everything from the Check Out screen!
- When finished in **Check Out** place the cursor in the **Item Barcode** box and press **Enter** to clear the screen, then you are ready for the next patron.
- When using **Calendars** it is possible to maneuver through months, days, years by clicking on the month and then each successive heading. Use the arrows to move backward or forward in time for each section.



- When using the **FIND TOOL (F12)** you can type the first letter of the **Search By** option you would like to use for your search. For example click on **SEARCH BY** and type T to go directly to title.
- **Patron Registration:**
  - Enter the Patron ID # **exactly as it looks on their ID** (including letters & dashes)
  - When saving a patron record there will be prompts that specify required information that is missing
  - The fee for a non-resident is automatically added to the account when the Patron Registration is saved

## Status Terms

### Circulation Status Terms

- ❖ On Order
- ❖ Being Processed – formerly In Processing
- ❖ Checked Out
- ❖ Checked In
- ❖ Recently Returned – formerly Shelving Cart
- ❖ In Delivery (Returning Home) – formerly In Transit
- ❖ Waiting for Pickup – Formerly Item Being Held
- ❖ Transit Hold
- ❖ Non-circulating – formerly Reference, Ready Reference and so forth
- ❖ Lost
- ❖ Trace
- ❖ Unavailable (Ex. Storytime)

### Holds Request Status

Patron record status for Holds:

- ❖ Requested – no copies currently available to fill hold
- ❖ Available Soon - copy checked in somewhere in system
- ❖ Suspended – delayed by patron or staff (vacation)
- ❖ Unclaimed –patron did not pick it up on time
- ❖ Expired – hold request timed out, usually 1 Year. Cannot be filled.
- ❖ Cancelled – cancelled by patron, staff or new order
- ❖ Shipped – in transit

**Practice Scenarios – work through the following before you leave:**

- 1. Complete a new patron registration. What fields do you need to confirm? Where is the ID field?**
  
- 2. A patron comes up to the desk and wants to check out their items but they don't have their library card with them. What steps do you take in Polaris to get the items checked out to the patron?**
  
- 3. A patron recently moved and wants to update their record. They want to change their address and their home library. They also want to receive text message notices.**
  
- 4. Renew one item for a patron. Renew several items for a patron.**
  
- 5. You are helping a patron check out an ILL. Extend the due date for the item.**
  
- 6. Holds! Place a hold 4 different ways:**
  - a. Place a hold from the check out screen**
  
  - b. Place a hold from the patron's All Items Out view**
  
  - c. Place a hold from a Bib Record search**
  
  - d. Place an item specific hold**